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Common Keystrokes and Hints for Working in PlanIT

1. *THE FIRST THING TO REMEMBER IS:* **When the system won't "let you out", HIT ESC TWO OR THREE TIMES.** Don't get caught in an error message that just keeps popping to the screen. Pressing the ESC key a couple times backs you out of the updates you have made to the current record or line. Often it will erase the record and you will need to start again.

2. *THE SECOND THING TO REMEMBER IS:* **It is best to press the TAB key to move from field to field, and always press the TAB key to move out of a field after you enter data so that Access will save your updates to that field.** Pressing ENTER usually will also move you from field to field, but when you type in a long text box (e.g., the Long Description or the Justification), pressing ENTER will put your cursor down a line. It is best to use the TAB key to move from field to field, and use the mouse to click on the TABs at the top of area of the Project Plan screen.

3. **Enter new records on the bottom line of any "continuous form" window (sometimes you need to scroll to the bottom)**. Continuous forms are windows that have a scroll bar down the right side and allow you to enter multiple choices for a single subject (e.g., Risks and Drivers). The last line generally as a "*" in the record selector area. When you start typing you will notice the "*" will turn to a "pencil". When you click to the next record (or the record above), the "pencil" will go away meaning the choice is saved. If you delete a choice, the "*" will be an "arrow", but that is still a data entry row, not a "real" blank row.

4. **Delete a row (or choice) on a continuous form by**: (a) clicking on the left record selector button at the left of the row -- the record selector button with the "arrowhead" will turn dark to indicate the record is selected; and (b) press your DEL key. You will get a message box confirming the deletion of one row, click yes.

5. **Spell check any text field**: by putting the cursor in the text field and pressing F7.

6. **To enter multiple choices for OTHER**: whenever you select an OTHER choice, there is a text area below where you can enter your Other selections. Enter multiple choices/answers in the one box separated by semi-colons – e.g., "Other Risks: xxxxx; yyyyy; zzzzzz." You cannot choose OTHER more than once in the continuous form selections.

7. **To Delete a whole Project**: If you have entered a Project (e.g., you have entered a Project Name and the system has assigned a Project ID number), and you have decided this is not a valid project (e.g., it was a test), you must let the PlanIT system delete the project. To do this, select Project Status as DELETE, save the record, and go to another project. Periodically the PlanIT system administrator will run a utility that will purge out the projects in Status=DELETE. The PlanIT system administrator will archive out Status=DONE and Status=CANCEL projects.

8. **You do not always need to press the SAVE RECORD button to save your data**. Access always tries to save your data, no matter what. You may press the SAVE button when you want, but if you forget (e.g., you enter some data and then just press the CLOSE button) your data should be saved.

9. **Please do not close the application with the X button in the upper right corner**. ***ALWAYS!!!*** Go back to the Main Menu and press the Bye button to close out of PlanIT properly!!

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PlanIT User Roles

Security Level>	Planner	Approve	Supv	Admin (CIO)
DEPT	Edit	Edit + Approve	Edit + Approve	Edit + Approve
AGENCY	n/a	n/a	Edit + Approve	Edit + Approve
STATEWIDE	n/a	n/a	n/a	Edit + Approve

1) PLANNER: Enters plans in their Department. Can change plans until Approved, at which time they can view but not change their plans. If a Planner needs to change a plan marked "approved", the Planner needs to contact the appropriate Approver/Supervisor to uncheck the Approved box for that plan.
2) APPROVER: Can enter plans in their Department and can review and Approve plans in their Department. Approver can change an approved plan without unchecking the "approved" box.
3) SUPERVISOR: Can enter plans in any Department in their Agency, can review and approve plans in any Department within their Agency. Supervisor can change an approved plan without unchecking the "approved" box.
4) ADMIN (CIO): Can edit/approve/see all plans Statewide.

NOTE: Only plans checked as Approved will be printed in the final 5-Year plan document. For example, if you have some Status=WISHLIST plans that you don't want printed, simply do not mark them as approved via the Approved checkbox.

IN ORDER TO APPROVE A PROJECT PLAN …

The following are the minimum requirements for successfully marking a project as approved (i.e, the "approved" checkbox will produce an error message until the following minimum project plan data criteria are satisfied):

- Project Name must not be blank
- Priority field cannot be "?"
- A Project Type must be selected.
- At least one Funding record must be entered with a FY equal to the "current FY" of the system (note: the amount can be $0 if necessary)
- At least one Objective must be selected in the Objective tab
- The Justification description (on the Statutory 2 tab) cannot be blank

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PlanIT Instructions
Planner

PlanIT

A). Getting Started

This document contains the instructions for Supervisor, Approver and Planner authority levels. The following describes the capability within each authority level:

- **<u>Planner:</u>** All users assigned Planner authority can only enter IT projects for their Department.

- **<u>Approver and Supervisor:</u>** All users' assigned Approver authority may enter IT projects for their departments and in some cases for their agency. Also, the Approver has the ability to enter Objectives and the authority to approve IT projects within their Department and in some cases for their Agency. All users assigned Supervisor authority have the same authority as an Approver however they also have the authority to approve Agency-wide (vs. just on Department).

- The first part of this document provides instructions for entering IT projects into the system. The second part of this document provides instructions for Approver and Supervisor level authority ONLY.

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So, let's get started

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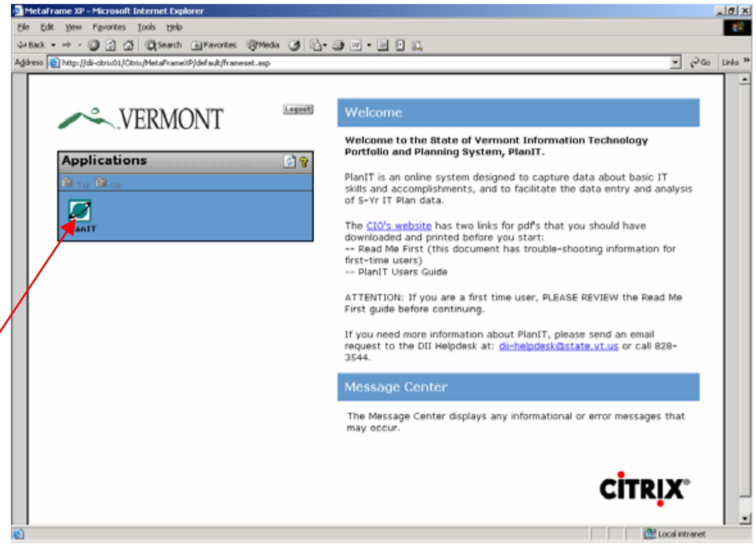
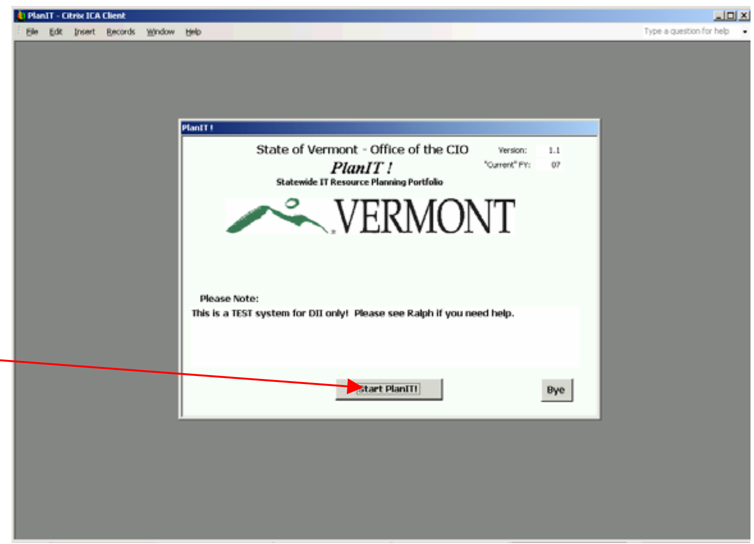
STEP 1

1. Start your Internet Explorer.
2. In the address box.
    a. **Type: www.dii.state.vt.us**
    b. **On left side of screen click on "CIO Central" link.**
    c. **On right side of screen click on "CIO IT Planning and Analysis" link.**
    d. **Click: "PlanIT Read Me First Guide" link and print this document.**
    e. **Click: "PlanIT Users Guide" link and print this document.**
    f. **Click: "PlanIT System" link.**
    g. **Click "PlanIT" button.**



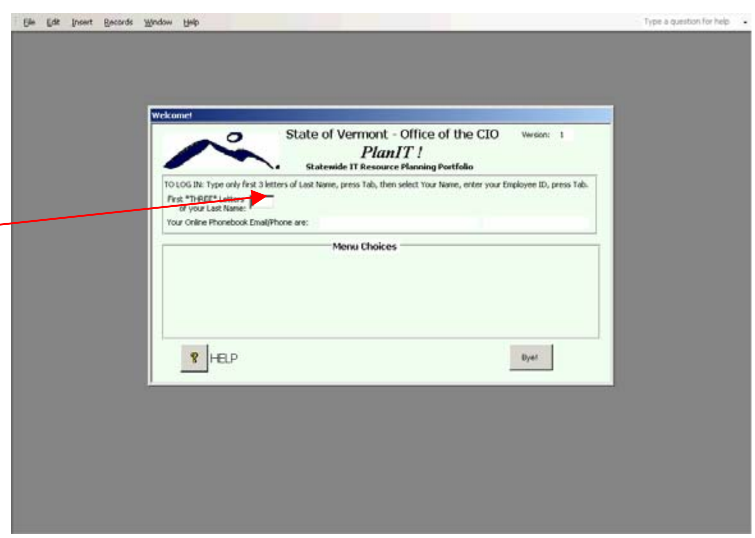
STEP 2

1. After you have clicked the PlanIT button the following screen will appear.
2. Notice in the top right hand corner the heading **"Current" FY: 07.** This represents the fiscal year of the next IT 5 Year Plan to be printed.
3. Click the **"Start PlanIT"** button to begin.



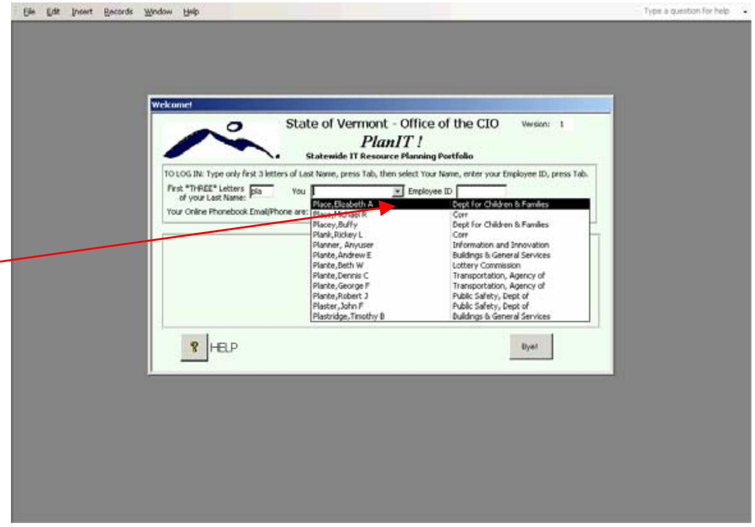
STEP 3

1. After you have clicked the Start PlanIT button the following screen will appear.
2. To begin the log in process type the **FIRST THREE LETTERS** of your Last Name and **PRESS TAB.**
3. **Note: "Help" button will provide a link to the User Read Me and User guide".**



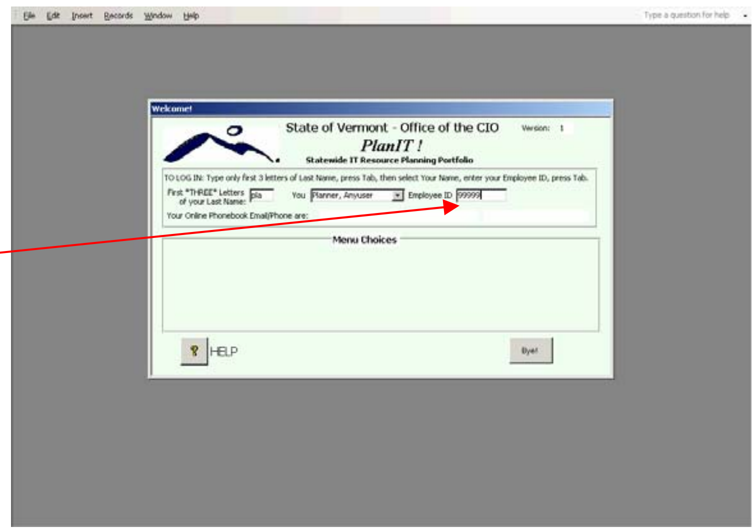
STEP 4

1. After you have entered the last three letters of your last name and pressed TAB the following screen will appear.
2. Click the arrow button on the **"You"** line, find and click your name and **Press TAB.**



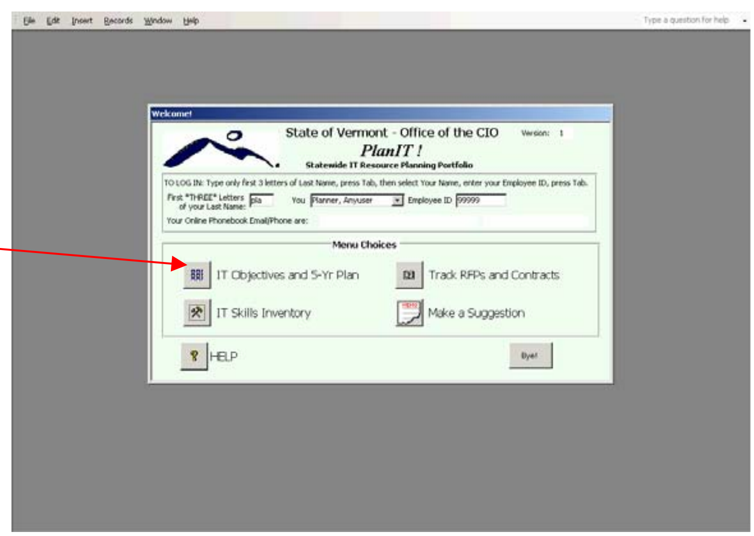
STEP 5

1. After you have found and click your name and pressed TAB the following screen will appear.
2. Type in your **Employee ID Number** and **Press TAB.**



STEP 6

1. After you have typed your Employee ID and pressed TAB the following screen will appear.
2. Click the **"IT Objectives and 5-Yr Plan"** Button.



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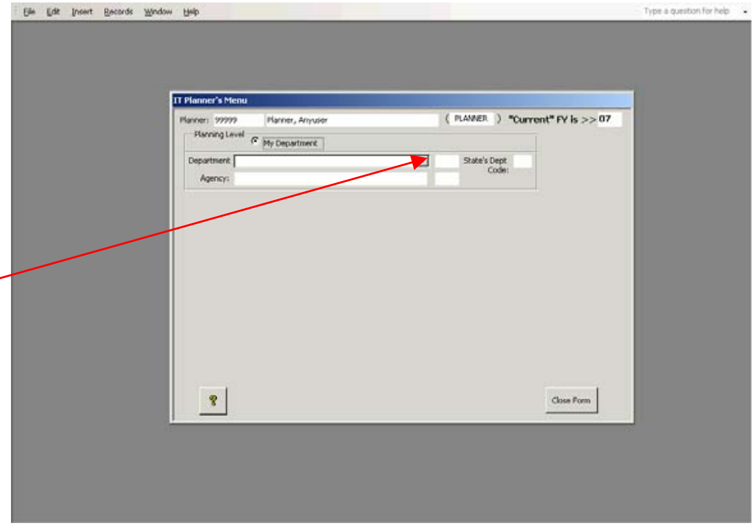
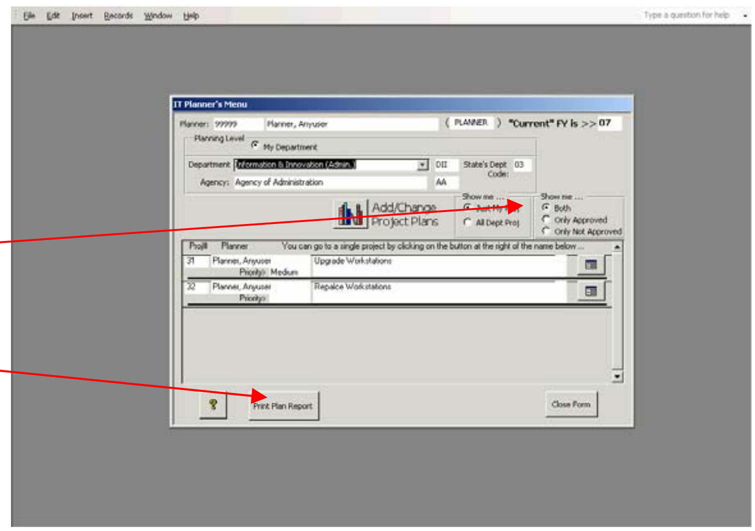
STEP 7



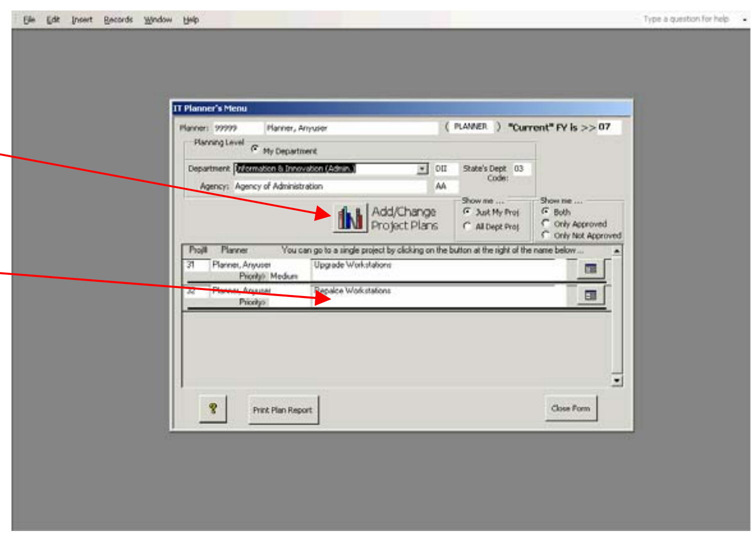
1. After you have clicked the IT Objectives and 5-Yr Plan Button the following screen will appear.
2. The **"My Department"** button will already have been selected. Move your cursor to the **"Department"** line drop down arrow box, highlight and click your department.

STEP 8



1. After you have click your department and pressed TAB the following screen will appear.
2. On this screen you may print your or your departments project reports based on the **"Show Me"** columns by clicking the **"Print Plan Report".**

STEP 9



1. To enter a project Click the **"Add/Change Project Plans"** button.
2. The project display screen will display projects that have already been entered for your department.

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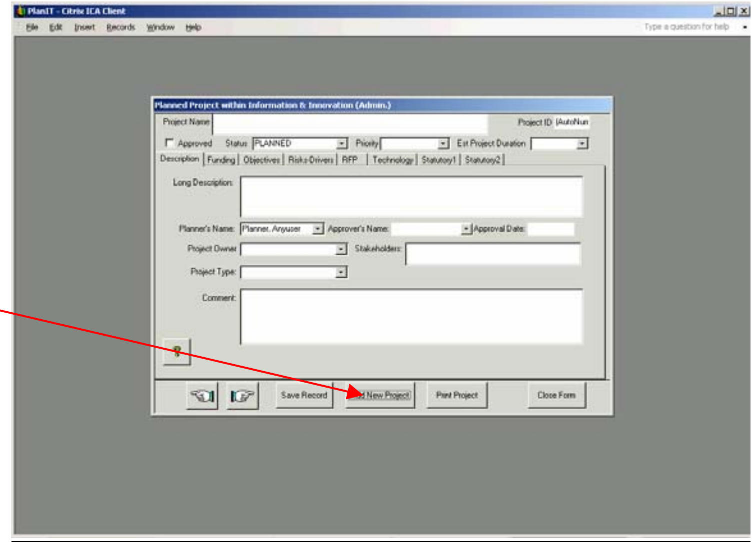
STEP 10

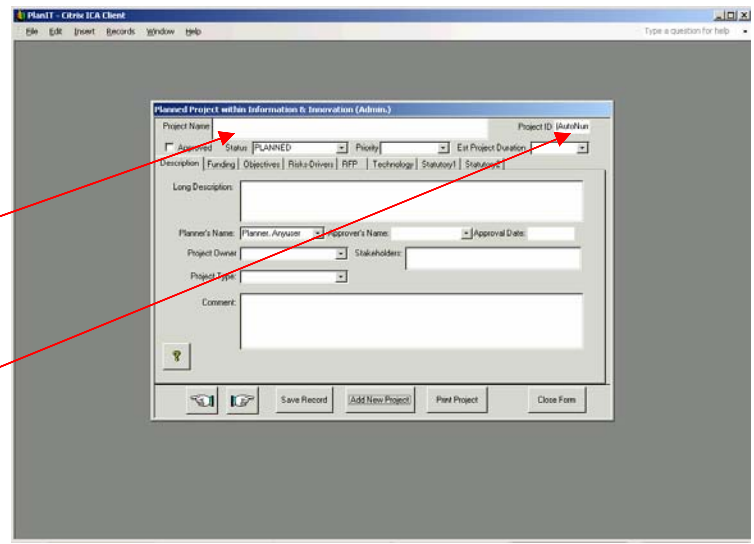
1. After you have clicked the "Add/Change Project Plans" button the following screen will appear.
2. Click the **"Add New Project"** button.



STEP 11

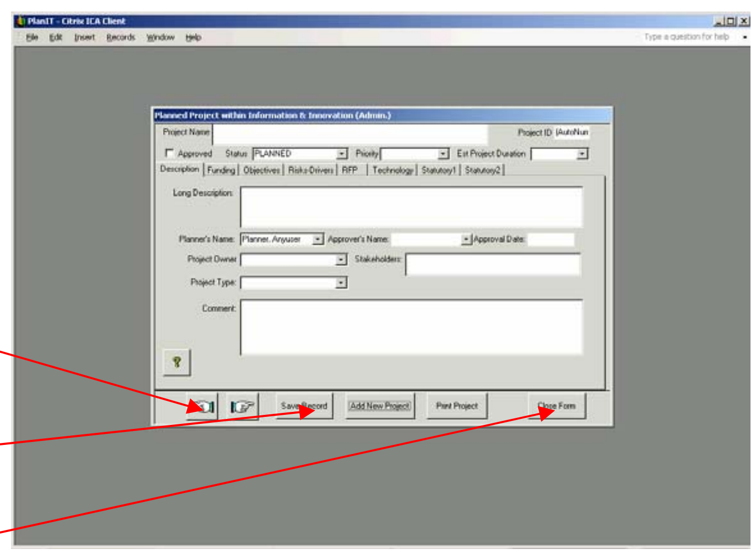
1. After you have Click the "Add New Project" button the following screen will appear.
2. You are now ready to begin entering your projects.
3. Place your cursor on the **"Project Name"** line and begin entering the name of your project. Once you have completed typing in your project name **Press TAB.**

(Note Project ID is automatically system generated)



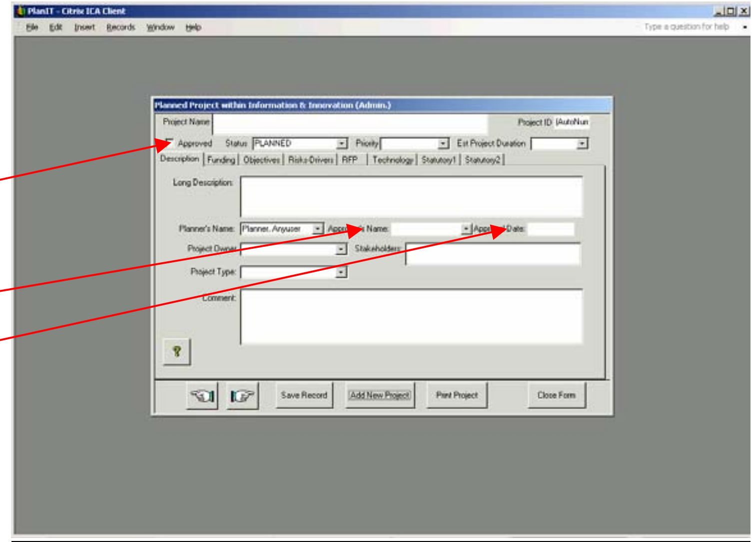
STEP 12

1. At the bottom of this screen are several buttons. The buttons provide the following functionality:
   a. The **HAND** buttons provides you the capability to scroll through projects that already been entered.
   b. The **"Save Report"** button enables you to save your input. Note, each time you utilize TAB to navigate through the screen the system will automatically save your data.
   c. The **"Close Form"** button enables you to close out of this screen and come back later to finish inputting your data.



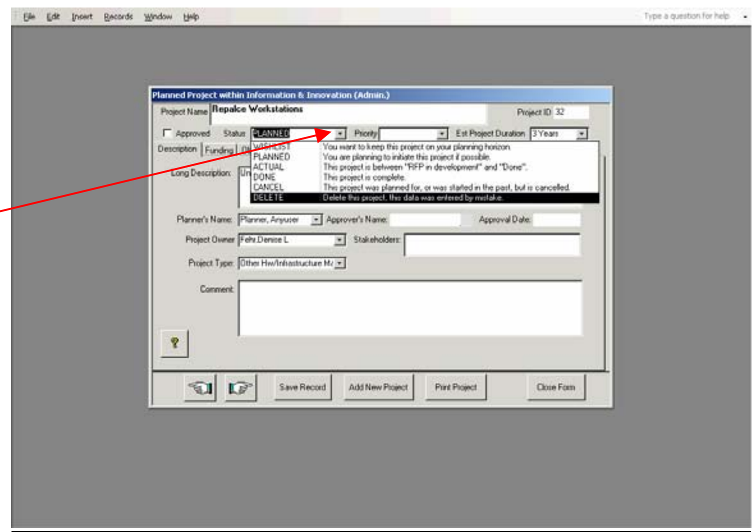
STEP 13

1. This step is for **Supervisors and Approvers** authority levels **ONLY**. The **"Approved"** box is used by the Supervisor or Approver to validate that the project information within their department(s) and/or agencies has been reviewed and agreement of its contents. Also, the **"Approvers Name"** and **"Approval Date"** will populate once you have checked the box.
2. Note: The only mandatory field is Project Name. However, the Project cannot be approved until the "required Approval Fields" are completed. (See Attachment 2).



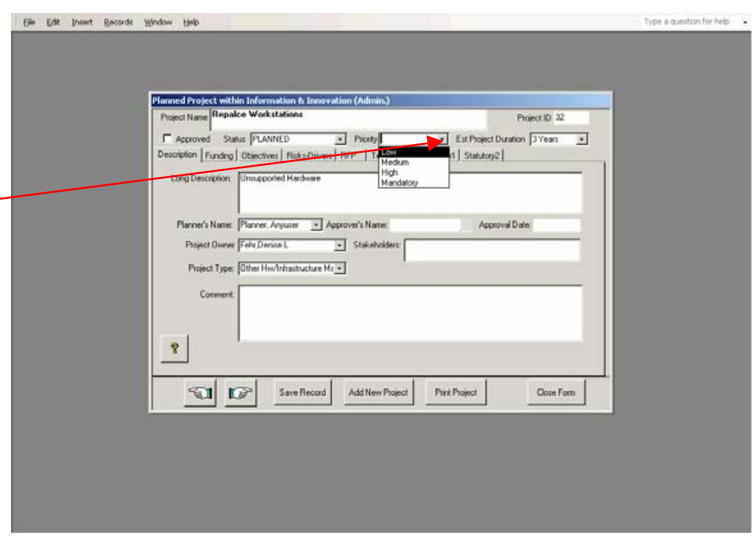
STEP 14

1. After you have completed entering the Project Name and Pressed TAB the following screen will appear.
2. **Place your cursor on the "Status" line arrow button and highlight and click the status of your project. Then Press TAB.**
3. **Note: If you entered a project in error you may select the "Delete" option in the Status line. The project will not delete immediately. The project will be physically deleted during system maintenance.**



STEP 15

1. Once you have selected the status of your project and pressed TAB the following screen will appear.
2. Placed your cursor on the **"Priority"** line arrow button and highlight and click the Priority of your project. Then **Press TAB.**



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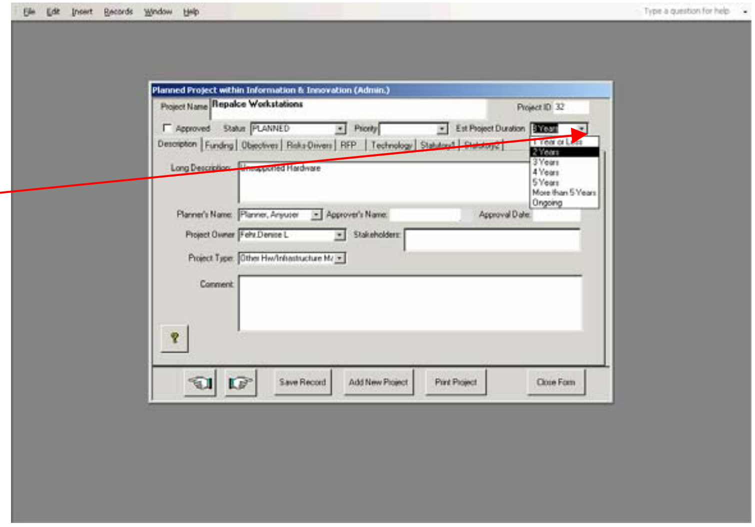
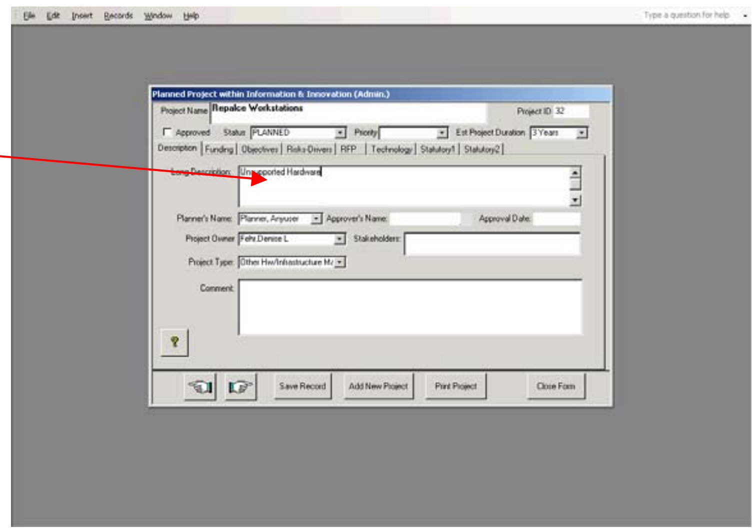
STEP 16



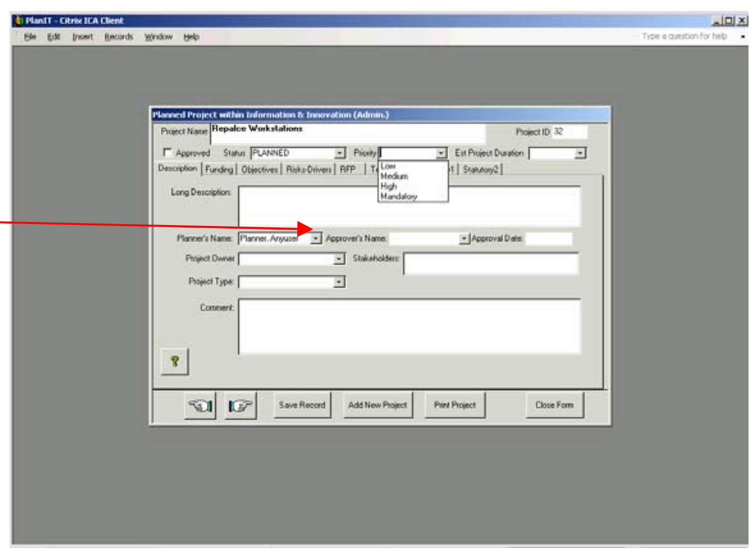
1. After you have selected the Priority of your project and Pressed TAB the following screen will appear.
2. Placed your cursor on the **“Est. Project Duration”** line arrow button and highlight and click the Est. Project Duration for your project.   Click on **“Long Description”.**

STEP 17



1. Begin typing in a brief description of your project in the **“Long Description”** line.
2. Once you have completed typing in your project description. **Press Tab.**

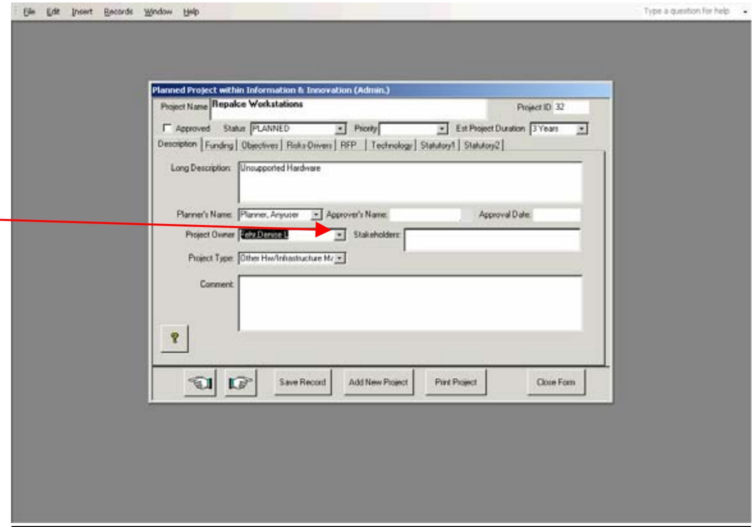
STEP 18



1. Once you have entered your project description and Pressed TAB the following screen will appear.
2. The **“Planner’s Name”** field will be highlighted with your name. If you were reviewing someone else’s IT project you would see their name highlighted. **Press Tab**

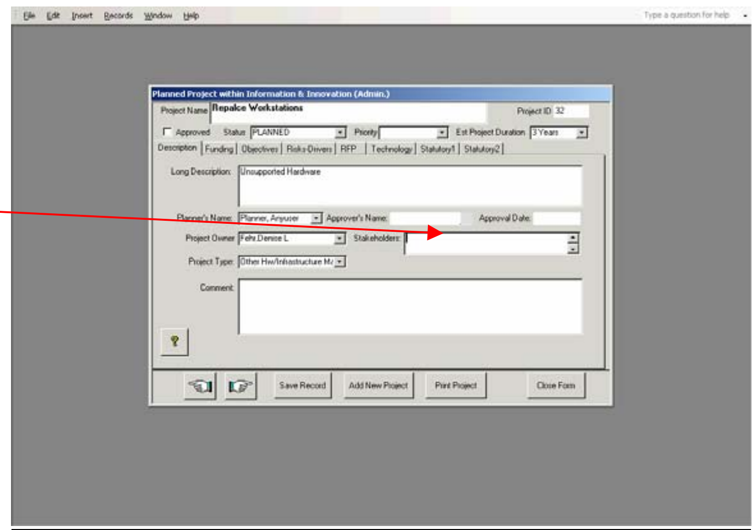
STEP 19

1. Once you have Pressed Tab the following screen will appear.
2. Click on the down arrow button in the **“Project Owner”** box and select who owns the project.
3. Once you have selected the Project Owner **Press Tab.**



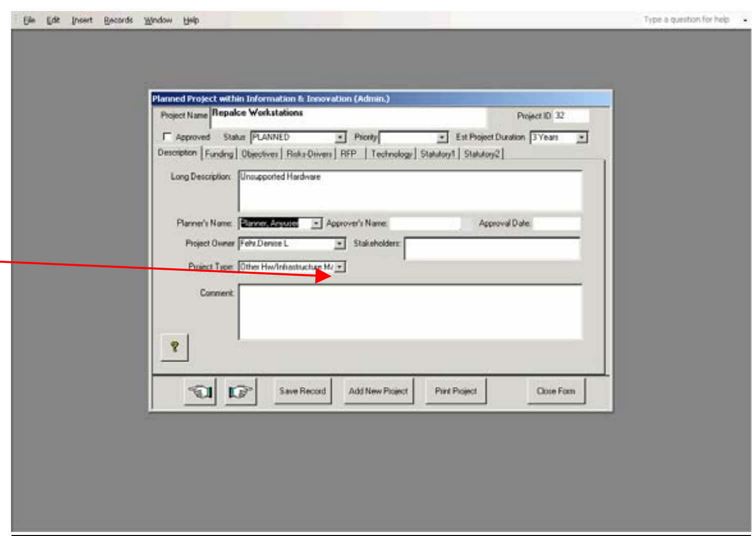
STEP 20

1. Once you have Click Tab the following screen will appear.
2. In the **“Stakeholders”** box begin typing in each of the project stakeholders last name first, first name, MI. Separate each stakeholders name with a semi-colon (ex Planner, Anyuser; Approver, Anyuser; etc).
3. Once you have completed typing in the stakeholders. **Click Tab.**



STEP 21

1. Once you have Click Tab the following screen will appear.
2. Click on the down arrow button in the **“Project Type”** box and select what type of project this is.
3. Once you have clicked the type of project **Press Tab.**



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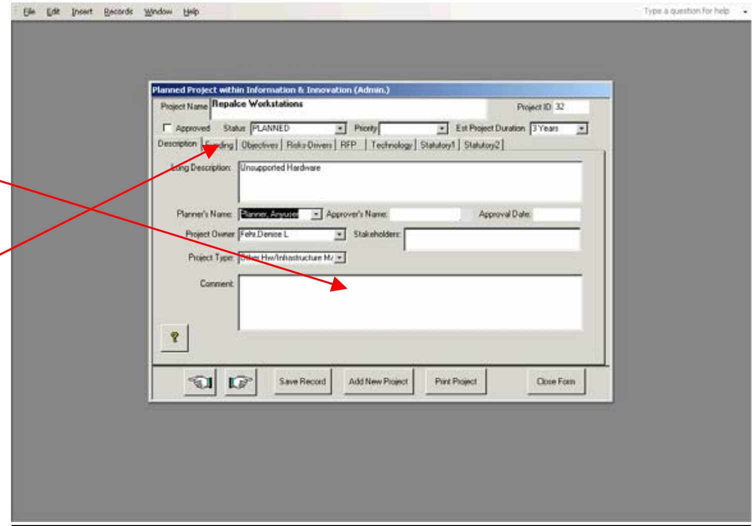
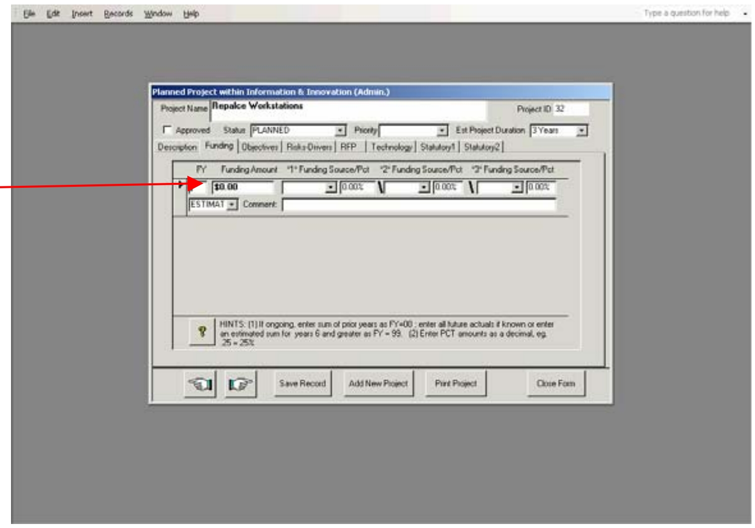
STEP 22

1. Once you have Press Tab the following screen will appear.
2. In the **“Comment”** box begin typing any additional comments you may have regarding your project. Note: If you selected “Other” in the “Project Type” box you will need to explain the type of project you’re entering.
3. **Click on the “Funding Folder”.**



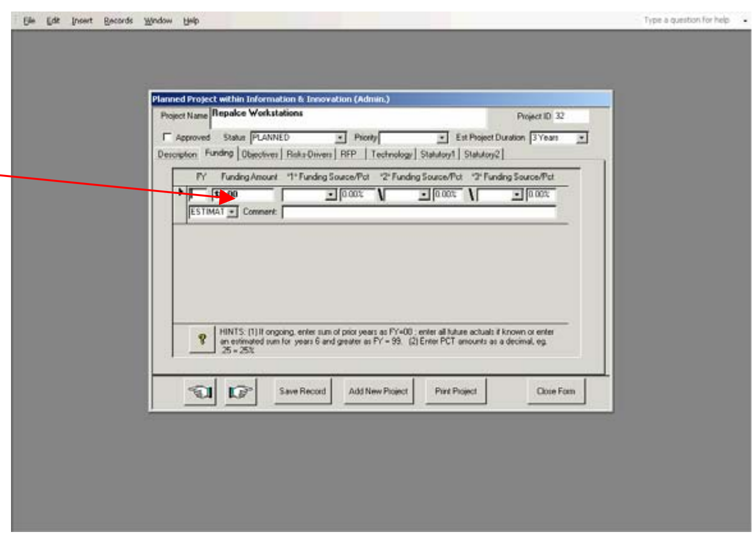
STEP 23

1. Once you have Click the “Funding” folder the following screen will appear.
2. Begin typing the **“FY”** your project will begin.
3. Once you have completed typing the FY **Press Tab.**
4. Note: Every approved project must have at least on FY line matching “current FY”.



STEP 24

1. Once you have completed typing the FY and Press Tab, the following screen will appear.
2. Begin typing the **“Funding Amount”** allocated for your project for the FY you indicated.
3. Once you have entered your funding amount **Press TAB.**



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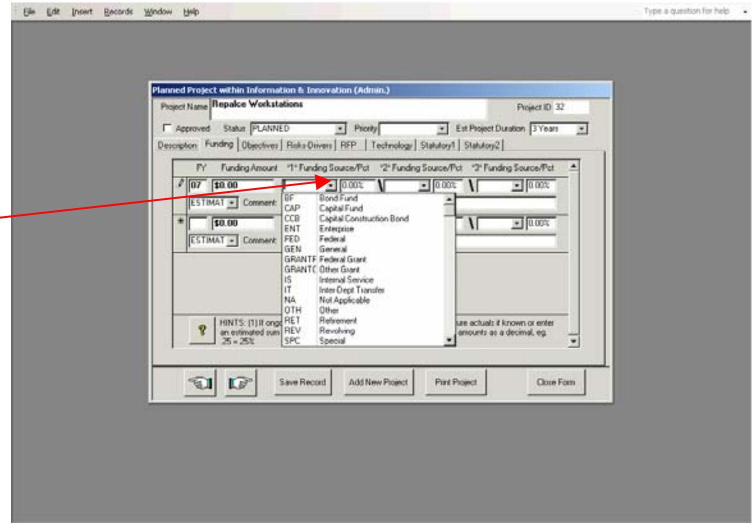
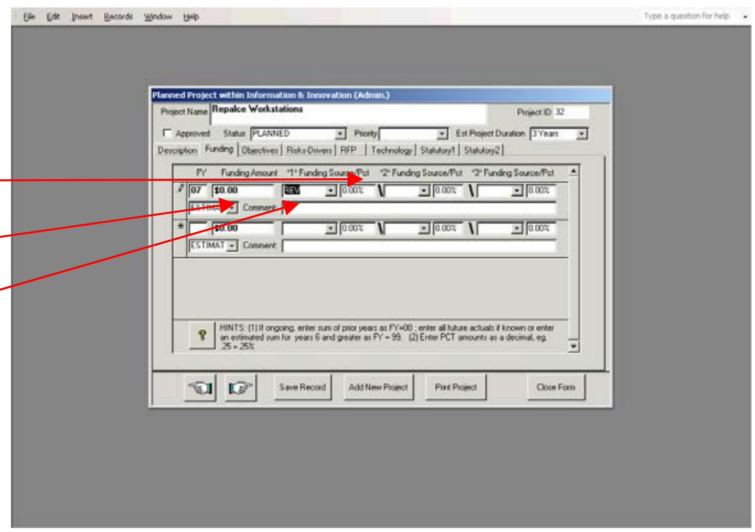
STEP 25

1. Once you have entered your funding amount and press TAB the following screen will appear.
2. Click on the down arrow button in the **“1 Funding Source/PCT”** box. Click on the funding source and Press TAB.



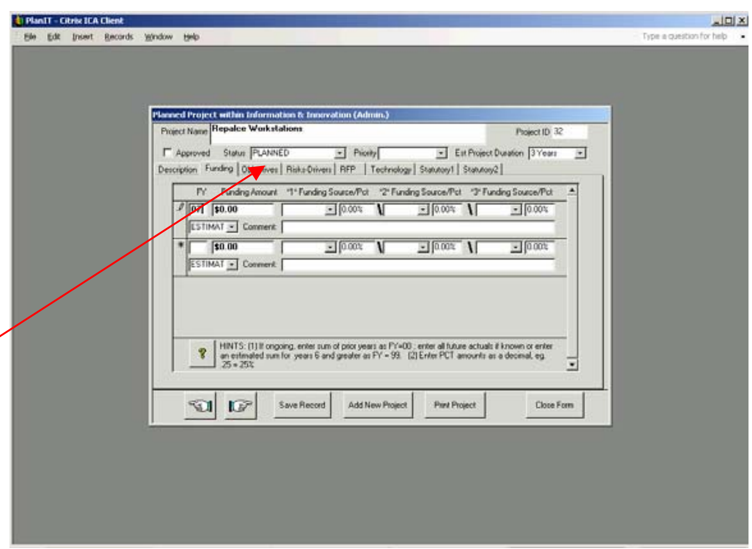
STEP 26

1. Once you have entered your “1 Funding Source” and press TAB the following screen will appear.
2. Enter the **“Percentage”** of the funding allocated for this project then **Press TAB**
3. Select if funding amount is an **Estimate or Actual** and **Press TAB.**
4. Enter any comment about the funding of your project.
5. Note: Percentage must be entered as a decimal, e.g. .25 = 25%.



STEP 27

1. Once you have entered funding allocated for this project press TAB the following screen will appear.
2. If your project requires additional FY funding allocations proceed as instructed in Step 23 until you have completed entering the required funding information for your project.
3. Note: The total of the percent values in one FY line must not exceed 100%.
4. **Click on the “Objective” Folder.**



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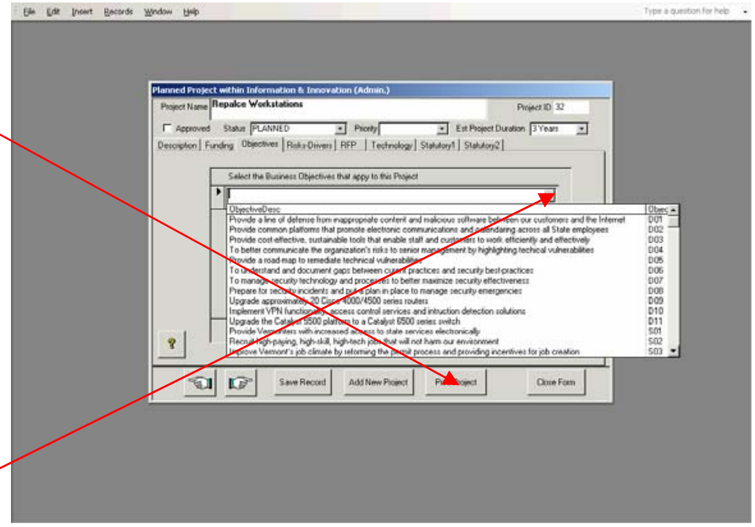
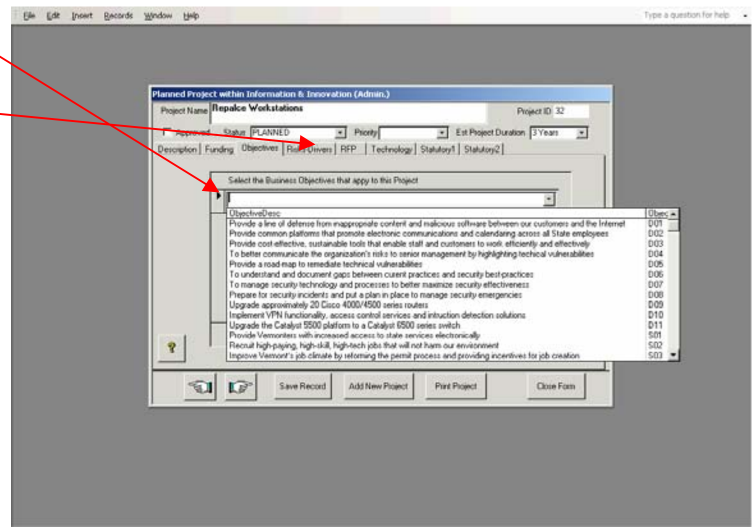
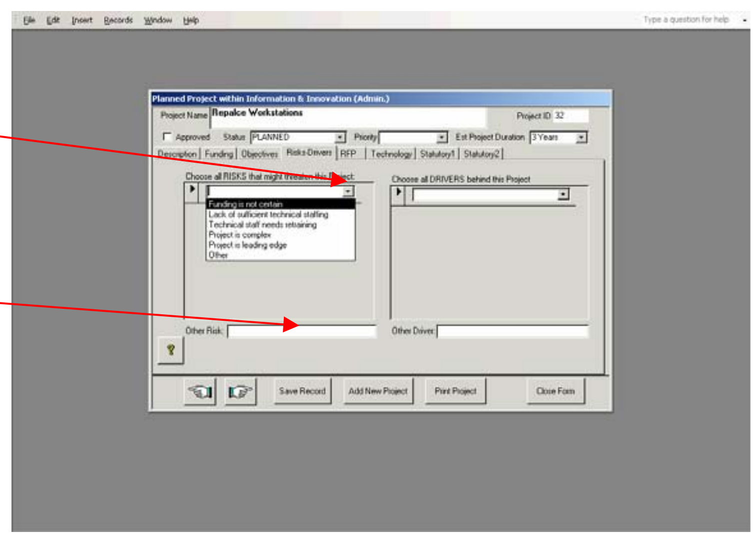
STEP 28



1. Click on the **"Print Project"** Button to get a printed listing of objectives in ID order.
2. Review the list of objectives on your printout. Notice that the objectives have an objective ID associated with them. This has been provided to simplify the process of selecting the objectives on the screen.
3. Click on the **down arrow button and select the business objective** that applies to this project by clicking on the listed objectives.
4. Repeat this step to add additional objectives.
5. If you made an error, place your cursor on the left hand record selector box identified with an → and **Press Delete** on your keyboard.
6. Once you have selected all of the objectives for this project **Click on the "Risk-Drivers" Folder.**



STEP 29



1. **Click on the down arrow** button and select the Risk(s) that may threaten your project.
2. Repeat this step to add additional risks.
3. If the Risks listed do not apply and you selected "Other", provide a comment in the **"Other Risk"** box.
4. Once you have completed selecting the Risks **GO TO STEP 30.**

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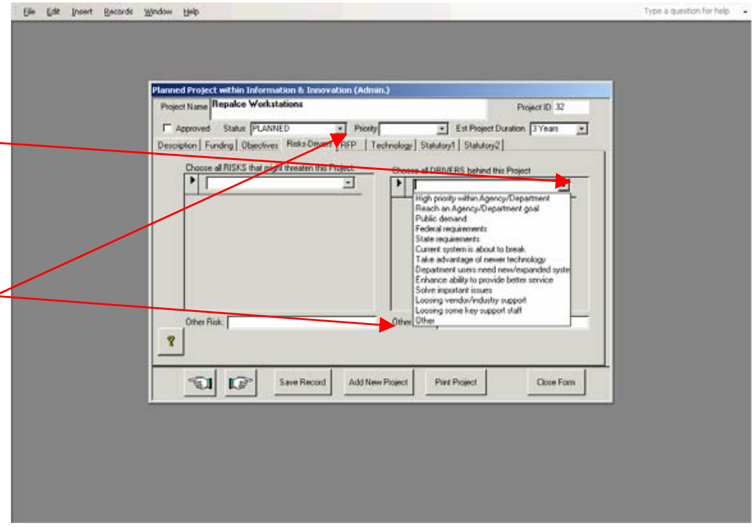
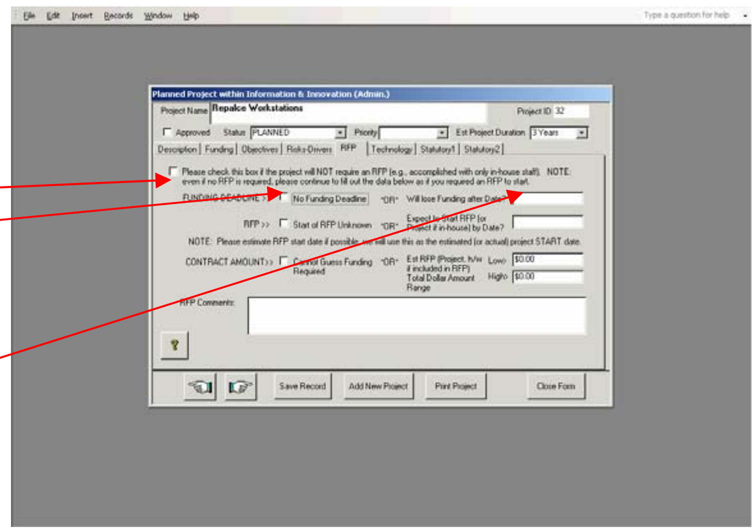
STEP 30



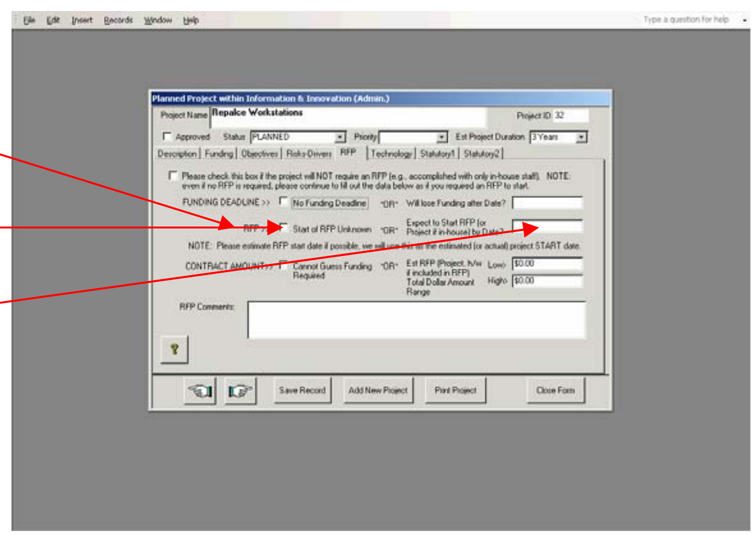
1. **Click on the down arrow** button and select the Driver(s) that are behind this project.
2. Repeat this step to add additional drivers.
3. If the drivers listed do not apply and you selected **"Other"**, provide a comment in the **"Other Driver"** box.
4. Once you have completed selecting the Drivers **STOP DO NOT PRESS TAB Click on the "RFP" Folder**.

STEP 31



1. The information on this screen is self explanatory.
2. If this project does not require an RFP select this box.
3. On the **"Funding Deadline"** Line:
   - If the funding for this project does not have a deadline select this box OR
   - If the project will lose it's funding – input the date this will occur.

STEP 32



1. On the **"RFP"** Line:
   - If you do not know when you will be starting the RFP select this box the funding for this project does not have a deadline select this box OR
   - If you know the RFP start date or project date (in-house) enter it.
2. **Go TO STEP 33.**

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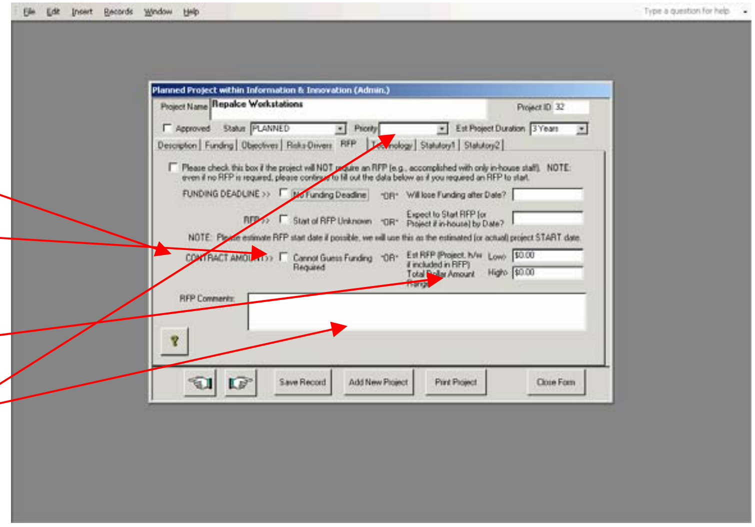
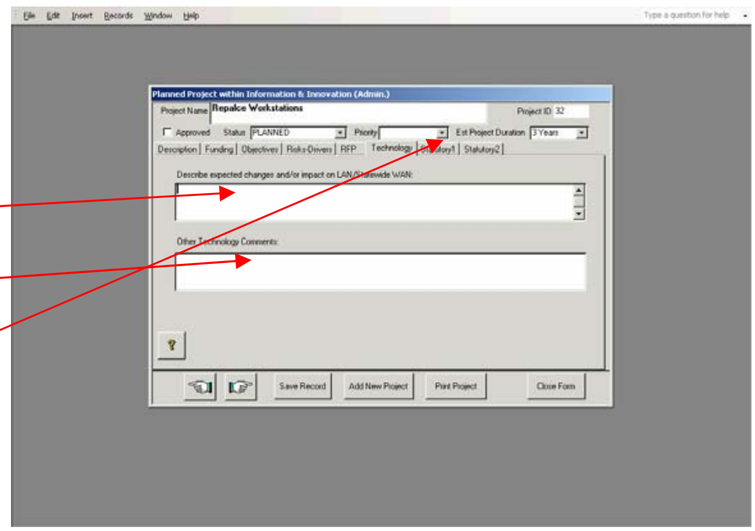
STEP 33



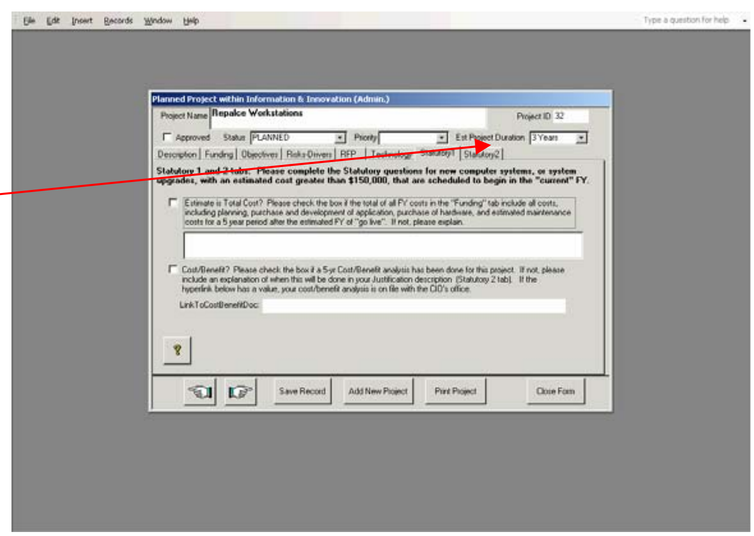
1. On the **"Contract Amount"** Line:
   - If you do not know the funding required for this project select this box OR
   - If you have an estimated total dollar amount for the project provide the low and high dollar amounts here
   - Please provide any additional comments in the **"RFP Comments"** box.
2. **Click on "Technology" Folder.**

STEP 34



1. The information on this screen is self explanatory.
2. Input any expected changes or any **LAN/State-wide WAN** impact this project may cause.
3. If you have any other technology comments please enter them here.
4. **Click on "Statutory 1"** folder.

STEP 35



1. The information on this screen is self explanatory.
2. Please select the appropriate box(s) if they apply.
3. **Click on "Statutory 2" Folder.**
4. **Note: Statutory 1 and 2 tabs: Please complete the Statutory questions for new computer systems or system upgrades, with an estimated cost greater than $150,000, that are scheduled to begin in the "current" FY.**

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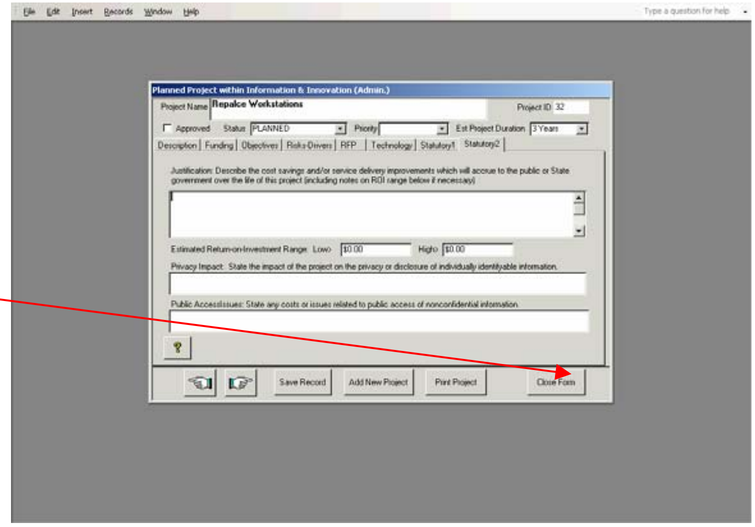
STEP 36

1. The information on this screen is self explanatory.
2. Please provide input for each section if they apply.
3. If you do not have any more projects to enter click the **"Close Form"** button.
4. If you additional projects to enter click the "Add New Project" and begin the process again.



The following section is to be used by Supervisor and Approver authority level users. This next section begins the entering of business objectives. The next section provides instructions on how to enter department and agency business objectives.

PlanIT

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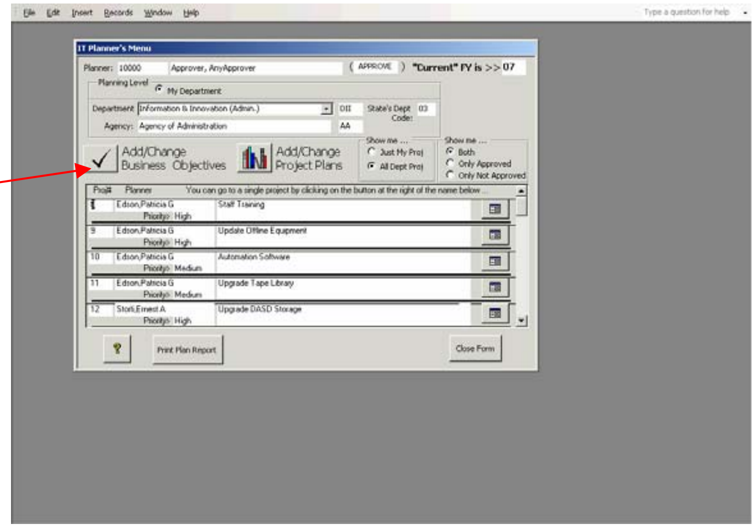
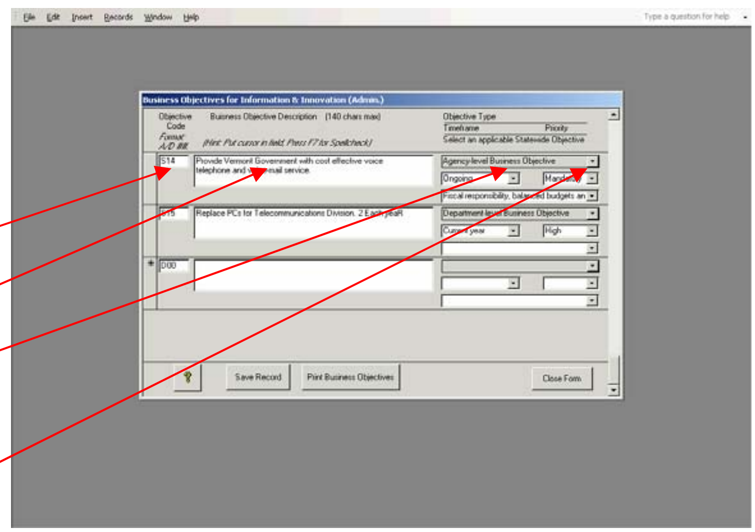
Entering Business Objectives
for Supervisors and Approvers



STEP 1

1. On the IT Planners Menu Click the **"Add/Change Business Objectives"** button



STEP 2

1. After you have clicked the Add/Change Business Objectives" button the following screen will appear.
2. Enter **"D"** and a sequential number if the objective is a Department objective or a **"A"** and a sequential number if the objective is an Agency objective and **Press TAB.**
3. Enter your objective and **Press TAB.**
4. Click on the **"Timeframe"** drop down arrow and select the appropriate choice and **Press TAB.**
5. Click on the **"Priority"** drop down arrow and select the appropriate choice and **Press TAB.**
6. Click on **"Statewide"** objectives drop down arrow and select the statewide objective that most closely relates to your objective.
7. Continue adding your objectives by following the previous steps.
8. You may print a list of objectives by clicking the **"Print Business Objectives"** button.
9. Once you have entered all of your objectives you may close the form by clicking the **"Close Form"** button.